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ABSTRACT

Unless school boards link member training and school improvement plans to performance evaluations for themselves and their schools, the exercise might not be worth the time and effort. Board evaluation should focus on three general areas: board dynamics, policy process, and educational quality. Three evaluation approaches should be considered: evaluation by school administrator; evaluation by state association staff or an outside consultant; or self-evaluation with an impartial facilitator. Work session retreats often provide a more conducive environment than a regular meeting. Surveys and videotaping can be incorporated into evaluation programs. Some processes include a consensus building technique, such as the Delphi Method or the Nominal Group Technique. Board training needs can include strong communication and media skills; knowledge of school finance, law, and collective bargaining; and an understanding of board powers and responsibilities. Decisions on board member training should consider relevant state requirements, community needs and resources, and board members' personalities. To be effective, programs should be geared to adult learners' needs. Successful reform depends on effective board decision-making to harmonize local needs with state and national mandates, finding sources, and political constraints. (MLH)

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Updating SCHOOL BOARD POLICIES

Volume 20/Number 9/October 1989

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Road to board success: evaluation...development...improvement!

by Daniel R. Davies

Understanding the basics of designing and conducting a board evaluation is the first step on the road to educational excellence. Unless school boards link member training and school improvement plans to an evaluation of their own and their schools' performance, the return on the investment of time and resources might be small.

In order to chart a course or set goals, a board first must determine its location. That's what board evaluation accomplishes; that's why the activity is crucial to charting a course to educational excellence. How a board chooses to conduct the exercise, of course, depends on the board itself as well as on the school and community milieu.

Before planning the year's new or continuing board member training, school boards might consider how much direction is given to this activity. By making a commitment to evaluation, boards will be in a better position to plan board development whether or not the training fulfills a state mandate.

With state associations now offering an expanded menu of development opportunities, board decisionmaking must extend to this as well as to traditional school policy areas. Without evaluation, board development runs the risk of being haphazard and unrelated to the achievement of school goals. With evaluation, board development can work in tandem with long-term school priorities.

A different breed

Most school boards present a stark contrast to a company's board of directors (each of whom is selected by a common constituency) or top-level managers (who are selected by one boss). School board members might represent a diversity of cultures, knowledge, constituencies, missions, and views. At times, the individuals might share little more than such general goals as providing a quality education and doing what is best for the children.

"The transition from citizen to policymaker for board members is not easy," notes Robert Miller (*School Leader*, Jan.-Feb. 1983). "Once-seated school board members, legally empowered to set policy, often are frustrated in achieving results...."

Effective group decisionmaking is an art learned slowly. "In our individualistic culture," writes Larry Swift, (*Washington State School Directors Signal*, Jan.-Feb. 1989), "we have very little experience making group decisions. However, we have discovered that when five citizens develop a strong, cohesive working relationship, they provide creative, decisive leadership for their schools."

Board evaluation is one of the ways boards can forge the relationships needed to ask the tough questions about achievement and productivity, to demand the sometimes tougher answers, and then to develop effective policy solutions. Building on a foundation of knowledge, board development and school improvement proceed more smoothly and constructively than would occur otherwise.

First, evaluation

Before undertaking board evaluation, consult your school attorney on whether the state's open meeting law applies to this activity. In Washington, for example, the state attorney general's office issued an opinion that an executive session for evaluation was legal because the subject pertained to the internal operations of the board and no public action would be taken.

Board evaluation should focus on three general areas: board dynamics, policy process, and educational quality. Excellent schools depend on all three. Although school reform is front-page news, often observers emphasize improvement issues and underestimate the importance of the first two factors.

Ideally, a board evaluation program will include several sessions (scheduled throughout the year) on specific topics in addition to one devoted to self-evaluation.

If only one session is possible, divide the time between a self-evaluation and one or two issues. Select the areas of greatest challenge in the upcoming year. According to Jacqueline Danzberger of the Institute for Educational Leadership, frequent trouble-spots are relations with constituent groups and parents, community in-

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Dr. Davies, working with Henry M. Brickell, developed the Davies-Brickell school policy classification and development system. This article is adapted from a 1988 project, **Guide To Appraising a Board of Directors**.

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Board Evaluation from page 1

volvement, board development, policy, planning, and oversight. Other areas of evaluation are the board/superintendent relationship, collective bargaining/personnel, curriculum, and evidence of pupil learning. [An old adage might apply here, "If it ain't broke, don't fix it." That is, if the productivity of the schools is satisfactory, the board must be working well.]

Consider three approaches to conducting a board evaluation: by school administrators, by state association staff or an outside consultant, or self-evaluation by the board (in this case, state association staff or a consultant might serve as facilitators). Possible approaches could be limited by the area of evaluation. For instance, school staff shouldn't conduct a session on the board/superintendent relationship.

Many boards find that work sessions or retreats offer a more conducive environment than a regular meeting. During most evaluations board members complete a questionnaire or series of surveys. Although the type of response ranges from multiple choice to essay, the survey should be as comprehensive and as quantifiable as possible so that answers can be tallied and assigned an appropriate ranking. After the responses are tabulated, the evaluation leader (the board president, superintendent, or outside facilitator) makes a brief presentation before the general discussion.

A sample survey is included in the administrator's copy of *Updating*. The questions can be adapted to accommodate the needs of each school board.

Some boards incorporate video technology into evaluation programs by taping one or more board meetings and then, as part of the evaluation, analyzing the meeting in terms of performance criteria. Also, several available board evaluation kits use a videotape to supplement the questionnaire.

Some evaluations include a consensus-building technique, for example:

- **Optional Consensus (Delphi) Method:** Although tapping time and paper, the method promotes agreement in large groups. Given a list of recommendations (e.g., policies or goals), board members assign a priority ranking to each. After the rankings are averaged, board members discuss the results before re-evaluating the priorities. Written reasons may be included at this point. Board members discuss the issues again and repeat the process a final time. In most cases, the review and discussion promote compromise. [The drawback is that the most imaginative or effective solution might not survive the averaging procedure.]

- **Nominal Group Technique:** This method encourages equal participation among board members. After hearing a staff presentation on the issue, each participant writes a solution (or goal, etc.). Board members take turns reading aloud their ideas. Discussion follows. Key to the activity's success is the nonjudgmental character of the exchange. By mutual agreement, individual views are consolidated and discussed again. The final vote might occur in several ways. Board members either can vote on each (or a certain number) of the ideas or can prioritize the responses.

The Des Moines (IA) School Board tried a seminar approach to overcome the problem of having too little of the board's time devoted to overall evaluation. Six give-and-take conferences between board members and school staff, outside experts, and community officials focused on "A Broad View of Education," "Education in Transition," "The School Board Views Itself," "Financial Accountability," "Inter-agency Relationships," and "Community Views."

Next, training

"Good board members are not born, they are trained," writes Mark Hurwitz (*Association Management*, August 1980).

In a 1985 U.S. Dept. of Education survey, board members and superintendents identified team spirit as the key trait of successful boardsmanship. Strong communications and media skills; knowledge of school finance, law, and collective bargaining; and an understanding of board powers and responsibilities also were named.

A 1988 study of training needs for South Carolina boards revealed a difference of opinion among boards and superintendents. Board members identified as priorities the public image of schools, budgeting, academic standards, and superintendent selection/evaluation; superintendents ranked board evaluation as the top need, followed by legal responsibilities of board members, the Freedom of Information Act, and superintendent/board relations. Training methods range from ongoing computer instruction and annual retreats to state association training (seminars, workshops, and conventions) and national association meetings. The annual NSBA Convention also provides a wealth of educational clinics and workshops for board members.

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Some states are formally encouraging and recognizing board training by creating "board academies" or certification programs. The purposes are twofold: to accredit board training opportunities and to track board member accomplishments as they progress to higher levels.

Some boards decide to focus on new board member training (or even sessions for candidates); others emphasize continuing education.

Decisions on board member training should take into account any relevant state requirements, community needs and resources, and the personalities of board members. But whatever priority areas are identified, the board should select programs designed to serve the needs of the adult learner. Board evaluation, with an emphasis on discussion and consensus-building, has a high rate of success because of the extensive participation among board members. Board development programs, however, run a higher risk of failure because of their goal to inform and to train. Adult learners, in particular, need to participate in learning; therefore, real-life problem-solving activity should be interwoven into the instruction.

Another vehicle for board training is a large three-ring binder. Presented to each new board member, the notebook contains:

- **copies of the most important school policies and regulations and summaries of the others;**
- **a statement of school learning goals and the corresponding data on student achievement;**
- **organizational charts and phone numbers;**
- **school and meetings calendars;**
- **names, addresses, phone numbers, and information on fellow board members;**
- **copies of key professional publications, associations, and staff names and numbers;**
- **minutes from past board meetings;**
- **a clear, concise summary of the current budget and curriculum goals, funding formulas, and standardized testing programs;**
- **an explanation and summary of key provisions of the negotiated contract (or teacher pay plans, benefits, and working conditions in nonbargaining states) and equivalent information on administrative and support staff;**
- **a map indicating each school's site, principal, current and predicted enrollment, and renovation needs;**
- **a review of construction priorities, debt information, and funding options.**

Material in the binder should be updated and supplemented as the board member's term progresses.

Don't forget public relations

Many boards include the costs of professional development in the annual budget and, if challenged, offer the same reasons given for funding teacher and administrator inservice. Even when budgets are tight, training should not be considered a "frill" to be cut. Also, remember that Chapter 2 funds can be used for the "training and professional development" of board members, including attendance at clinics, conventions, and workshops.

A policy on board development is a wise inclusion in the district manual. Advises Vernon Noggle (*Ohio School Boards Association Journal*, September 1981), "Your policy on attendance at professional meetings should be publicized, not hidden. . . . The board should encourage and praise educators who not only attend conferences, but who get actively involved in professional organizations."

Additionally, the policy should specify the acceptable activities, compensation rates, mileage allowances, and approval procedures. Policies should prohibit first-class air travel, side excursions, or family members' travel at board expense; however, individuals should be allowed to pay for these extras (or the entire trip) if they choose. Reimbursement on a per-diem rate based on the city where the activity is located is another policy option. (The local convention center or visitors bureau can supply the information.) Many boards require submission of vouchers for all expenses except tips and vending machine sales.

Ways to publicize training

Determining and publicizing development activities cause problems for many boards. Responsibility might be assigned either to the board (at its annual organizational meeting) or to an in-service planning committee. The group should discuss the relative benefits of each activity, the needs and interests of board members, and funding resources.

A board development calendar serves the interests of some boards. A calendar of activities and a copy of the relevant policy can be sent to parents in a school newsletter or to the media. The community relations officer should notify the media about upcoming meetings to encourage local publicity. Following the session, board members should prepare a written report, a summary of which can be presented at the next board meeting.

In the future

A board member training program—on computer—might be one future way to overcome the problems of travel expense and scheduling that frequently thwart interest in development. Computer instruction can emphasize problem-solving or content and can respond to the individual learning needs of the board member. The interactive and nonjudgmental nature of the medium is a benefit to many adult learners.

"Computer-based training," write Alton Harrison, Jr., and Diann Musial (who conducted the U.S. Dept. of Education study referred to earlier), "offers several advantages to school board members. First, it permits easy updates.... it respects the diversity of school board member backgrounds.... has built-in repetition and allows learners to proceed as slowly as they wish without public embarrassment."

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Court View from page 4

ity vary according to the jurisdiction, circumstances, and state law.

The Montana Supreme Court said the school board was not liable for the injury of a high school cheerleader during a privately sponsored clinic (*Rollins*, 1988). Similarly, Pennsylvania courts have applied the state's governmental immunity legislation to negligence lawsuits arising from high school football (*Wilson*, 1989), cheerleading (*Messina*, 1986), and volleyball (*Zelenevich*, 1984) unless the injury was due to negligent upkeep of the property (e.g., a gym floor in *Singer*, 1986).

However, courts allowed a jury trial in Florida (*Leahy*, 1984) and Indiana (*Beckett*, 1986) and upheld judgments for other injured athletes in Michigan (*Vargo*, 1980) and Minnesota (*Verbel*, 1984).

Recently the Mobile (AL) Board of School Commissioners settled a case for $2.1 million (to be paid by the district, a teacher, and a former principal). Parents filed suit after their daughter, a high school cheerleader, suffered permanent paralysis from the waist down when she attempted a difficult stunt and fell on a concrete floor. The suit alleged that the activity was improperly supervised and that board policy was negligent because it did not require use of protective mats or spotters.

Consent forms

Although the *Odessa* decision overturned the use of mandatory waivers, the court left open the possibility that forms listing the specific risks of each activity might reduce school liability by giving participants full information on the dangers. Other courts have let juries decide the effect of a release form on district liability (*Tepper* NY 1989).

An Illinois appeals court ruled that the form in question was specific enough to bar liability, as a matter of law, after an adult suffered an injury during an adult education program (*Poskozim* 1985). Similarly, in *Childress* the appeals court ruled in favor of the board, saying that a teacher's simple negligence did not override the waiver signed by the parent. In that case a teacher failed to notice when a special education student did not exit the pool along with the others, sank to the bottom, and sustained injuries.

Policy impact

In order to reduce liability in extracurricular activities, board policy should direct that written material provided to parents and students describe the risks of each activity, even though in some cases participation might decline. ■

Policy Adviser from page 8

[Many states have provided for additional employee rights, so consult your school attorney or state school boards association for guidance.]

Federal and state law in effect open up child care leave and post-delivery (or adoption) care of the child to fathers as well as to mothers. In other words, pregnancy and childbirth recuperation are considered a disability or medical condition; traditional maternity leave for the care of the child is replaced by parental leave. In both cases, policies should stipulate the maximum amount of leave time allowed and whether or under what conditions the employee draws salary.

School officials might want to review the policy language in leave policies. Reference to "family" implies a legal relationship whereas "household" includes cohabitation as well as marriage. San Francisco recently passed an ordinance giving city workers living in nontraditional relationships (unmarried heterosexual or gay partners) the same maternity leave, bereavement, and hospital visitation rights as married couples have. ■

Board Evaluation from page 3

Improvement

Successful reform depends on effective board decisionmaking to harmonize local needs with state and national mandates, funding resources, and political constraints. Board evaluation offers the opportunity to clarify these factors. By doing so, school boards can assess practical alternatives and can work towards reaching consensus on approaches and goals.

Boards might consider their evaluation and development activity within the context of a strategic improvement plan. For many years, companies have used the plans to achieve goals in the face of "dynamic forces of change," writes Janice K. Johnson in *American School Business Association* (Winter 1989).

Johnson describes the "essential steps" as:

- **formulating a mission statement and goals;**
- **assessing strengths and weaknesses;**
- **reviewing the organizational structure and community/political environment;**
- **specifying objectives, priorities, strategies, and resource allocation to achieve goals;**
- **implementing plans.**

Similarly, one of the goals of board evaluation can be the development of a strategic plan for school improvement. Then, board development opportunities are evaluated in terms of the long-range goals. If board evaluation targets a specific area, the strategic plan can be adapted to reflect program needs (e.g., curriculum, finance, pupil achievement, or personnel). Whatever the topic, the bottom-line question remains: How well is the board and school policy helping students master more of what they are suppose to learn?

Just as teachers, administrators, and support staff need performance reviews and continuing education to insure quality, so do school boards. Through a three-step process of evaluation, development, and improvement, boards can link board member training to educational excellence. ■